Koop seeks voluntary curbs

By STEVEN W. COLFORD

WASHINGTON—U.S. Surgeon General C. Everett Koop's parting shot at alcohol marketing is based mostly on industry cooperation, not government intervention.

And that's a much tamer request than advertisers and broadcasters had expected from him.

Only two of Dr. Koop's 10 key recommendations involved advertising and marketing. He called for matching alcoholic beverage ads with an equal number of pro-health and pro-safety messages, and urged the restriction of certain types of advertising and marketing practices, especially those that reach people under the legal drinking age.

The surgeon general said the 10 recommendations, culled from his controversial Workshop on Drunk Driving last December, have the greatest "potential for saving thousands of lives."

All of the workshop's 200-odd recommendations were forwarded to Congress, the White House, state governments and private groups.

A Senate committee chaired by Sen. John Glenn (D., Ohio), is expected to consider the report at a public hearing scheduled to begin June 15.

Included in that lower tier are calls for federal legislation eliminating most tax deductibility for alcohol advertising and putting health warnings in alcohol ads.

The lower tier of recommendations doesn't "necessarily" reflect the surgeon general's own views, a spokeswoman said.

Dr. Koop plans to retire July 13.

His sharpest criticism hit at what he called "marketing practices [that] send the wrong messages about alcohol consumption to the wrong audiences."

Those practices include college promotions, celebrity endorsers, musical- and sporting-event sponsorships, and alcohol ads fashioned around race-car driving or other activities that are dangerous in combination with alcohol, he said.

But, again, Dr. Koop called on alcohol marketers and colleges to curtail such practices voluntarily instead of recommending restrictive legislation.

"The surgeon general rejected by implication the vast majority of proposals from his workshop's advertising panel," said Dan Jaffe, exec VP at the Association of National Advertisers. "He had time to look at all of their more restrictive recommendations, and if he thought they all were right, don't you think he would have given them his outright support?

"Congress will also take that into account when it weighs the recommendations."

Even Anheuser-Busch and Miller Brewing Co., which were singled out for criticism by Dr. Koop for using ads that appeal to children, found something to like in the report.

"Our basic reaction is that he said some things that we can support and some that we have a real objection to," said Steve Lambright, VP and group executive for A-B. "The educational programs he proposed are on target, but it is an oversimplification to say that tax increases and restrictions on advertising will eliminate abuse.

"And if his point is that [Spuds MacKenzie, the dog in Bud Light ads] is aimed at children, we disagree. What is in it for us to aim ads at kids, anyway? We are not naive in thinking that those under age don't drink, but there is nothing in it for us to cater to that market. Just because a child may see Spuds, it doesn't mean this is what causes an underlying alcohol problem."

Wally Snyder, senior VP at the American Advertising Federation, agreed that virtually all ads can be, and probably are, seen by children. But, he said, "You can't separate ads that can be seen by kids just for that reason.

"There are problems with some of his recommendations," Mr. Snyder said. "What is counteradvertising? What is equivalent time? But it appears that farthest from his mind is any mandatory counteradvertising or mandatory restrictions of advertising."

Miller Communications Director Steve Forsyth disagreed with the surgeon general's attack on sporting and musical-event sponsorships and other promotions.

"We don't think sponsorship restrictions are the answer to the problem of under-age drinking," Mr. Forsyth said. "That is an en-

(Continued on Page 70)

Photo by Susan Bowser

Dr. Koop's recommendations were tamer than expected.

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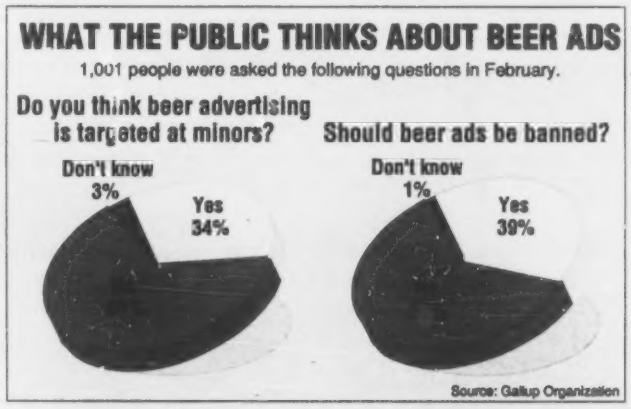
WHAT THE PUBLIC THINKS ABOUT BEER ADS
1,001 people were asked the following questions in February.
Do you think beer advertising is targeted at minors?
Don't know 3%
Yes 34%
Should beer ads be banned?
Don't know 1%
Yes 39%
Source: Gallup Organization

John Heiland

Survey shows 39% favor beer ad ban

By STEVEN W. COLFORD

One-third of Americans surveyed for ADVERTISING AGE believe beer ads are aimed at minors, and an even larger number favors prohibiting those ads.

The Gallup Organization conducted the survey for AD AGE in February via 1,001 phone interviews nationwide with people ages 18 and older selected randomly. The margin of error is plus or minus 3.1%.

The results showed little variation by sex, age, race, geographical region and marital status.

Overall, 34% said beer ads target those below the legal drinking age, and 63% said beer ads aren't aimed at minors.

Slightly more Asian/native Americans (46%), people who had less than a high school education (45%) and blacks (44%) said beer ads do target those below the drinking age.

More people in professional-managerial (72%) and secretarial-clerical (71%) jobs and those ages 18 to 34 (70%) said the ads aren't targeted at those under the legal drinking age.

Of those surveyed, 39% favored a ban on beer ads; 60% opposed it.

Advertising for Anheuser-Busch's Budweiser brand registered the highest recall level among beer ads, 29%, among all people surveyed.

Of those who said they think beer ads are targeted to those below the legal drinking age, 17% singled out Budweiser, the highest for any single brand.

That high correlation between ad awareness for Budweiser and the perception that Budweiser ads target minors may be a simple function of recall level.#

Can't sell them? Send them to our Orange County store. Everything sells there. . ."

Orange County is the nation's 13th largest retail market, ahead of San Diego and San Francisco.
(Source: S&MM, 1988 Survey of Buying Power)

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PREPARING FOR A UNITED EUROPE

Agencies brace for new Europe

By LAUREL WENTZ

LONDON—An ambitious young new-business director at an agency here is learning Spanish in the hope his job will include continental Europe before 1992.

D'Arcy Masius Benton & Bowles boasts that it pays bills in European Currency Units, better known as Ecus (pronounced ek-ooze).

Ogilvy & Mather is touting the entire country of Belgium as a test market for European product launches.

Multinational agencies have dual priorities in preparing for 1992: gearing up themselves and advising existing or prospective clients.

Increasingly, accounts are moving on a pan-European basis. Many advertisers are consolidating spending by brand or product category with a single agency and launching products with a pan-European rollout.

More than $1 billion in pan-European business has been awarded to agencies since early 1988 *(see chart)*.

Thirty-six accounts worth more than $10 million each have found homes, with a total value of $976 million. Fourteen smaller pan-European accounts—with a combined value of $71 million—also have moved.

Saatchi & Saatchi Advertising's aggressive pursuit of new business is paying off, gaining the most pan-European accounts and the largest dollar amount of any network. Saatchi won seven of the $10 million-plus accounts, totaling about $200 million.

Also, Ayer International and Young & Rubicam each won more than $100 million.

Ayer won about $145 million in pan-European billings from Gillette, Beiersdorf and SEAT. The Spanish automaker's account alone is worth $100 million.

Y&R won five pan-European accounts worth a combined $103 million.

DDB Needham Worldwide, Ogilvy, D'Arcy and BBDO Worldwide each won between $50 million and $80 million.

With such sizable accounts up for grabs, agencies are beefing up their European new-business efforts, a key element in competing successfully in a single European market.

J. Walter Thompson Co. is targeting 25% growth in billings in Europe for this year. JWT recently tightened procedures by requiring local new-business staff to report to Brian Johnson, European new-business director.

Every quarter, JWT staffers report on how they're meeting their targets; they report weekly on what meetings they've scheduled with prospects for the next four weeks.

"It's like any accounting or financial procedure, and we don't see why that shouldn't apply to new business," Mr. Johnson said.

This month, Mr. Johnson is hiring a U.K. new-business director—a job he's done himself until now—to let him concentrate on helping JWT's European offices.

Grey Advertising is restructuring to give key executives pan-European responsibility in the crucial areas of new business, media, finance and creative services.

Roger Clayton, chief operating officer of Grey's agency here, will run a permanent European new-business unit that will draw on the resources of local agencies. The head of Grey's West German agency will be in charge of media, the Italian top executive will have responsibility for finance and France's top executive will be in charge of creative.

"Unless you can change the way people think about their job and territory, you will achieve nothing," said Roger Edwards, Grey chairman here.

With major accounting companies like Ernst & Whinney and Arthur Andersen & Co. working hard at developing 1992 expertise, Mr. Edwards said, agencies "may lose our place as the principal advisers to corporations unless we get our act together."

Taking a different approach, D'Arcy was inspired by winning the U.K. government's account to promote awareness of 1992 and ended up setting up its own 1992 department. That staff tailors presentations for marketers that want to know what impact 1992 will have on their specific industries.

One of O&M's 1992 strategies is Eurotest, a European test market program using Belgium. O&M picked Belgium because of its representative cultural mix, well-developed media, two distinct language groups, open economy and concentrated retail network.#

PAN-EUROPEAN ACCOUNT WINS 1988/1989

These pan-European account shifts each worth $10 million or more have moved since January 1988. Value of accounts in millions of dollars.

Advertiser	Value	Winner
Texaco petroleum	$ 10	DMB&B, London, Amsterdam
Fruit of the Loom outer/underwear	$ 10	Alliance Int'l, London
Kimberly-Clark Kleenex tissue	$ 10	Publicis/FCB, London
Philips personal appliances	$ 10	DMB&B, London, Amsterdam
Helena Rubinstein cosmetics	$ 10	FCA!, Paris
Continental Tire tires	$ 10	Ogilvy & Mather, Frankfurt
Federal Express courier	$ 13	KHBB, London
Northern Telecom corporate	$ 13	BSB Dorland, London
Philips lighting	$ 15	DMB&B, London, Amsterdam
Spanish Tourist Bureau	$ 15	DDB Needham, Madrid
Johnson & Johnson Carefree/skincare	$ 15	Young & Rubicam, Frankfurt, Milan
UDG Gordon's Gin	$ 15	DMB&B, London
Europcar auto	$ 16	McCann-Erickson, Paris
Gillette Natrel Plus	$ 16	Saatchi & Saatchi, London
Int'l Wool Secretariat	$ 17	BBDO, Paris
Reckitt & Colman Airwick	$ 17	Young & Rubicam, Paris
Canon camcorders	$ 17	Saatchi & Saatchi, London
Jacobs Suchard coffee	$ 18	Saatchi & Saatchi, Frankfurt
UDG Johnnie Walker whisky	$ 20	WCRS, London
Quaker Gatorade	$ 20	Young & Rubicam, London
Philips/Whirlpool	$ 20	Publicis/FCB, London
Trans World Airlines	$ 21	Young & Rubicam, London
Hewlett-Packard computers	$ 25	Saatchi & Saatchi, London
Seagram's Martell	$ 25	DDB Needham, London
Alfa Romeo auto	$ 25	Conquest Europe, Milan
Gillette Antica, Aapri, Silkience	$ 30	Ayer Int'l, London
United Int'l Pictures promotion	$ 30	Young & Rubicam, London
Henkel detergents and cleaners	$ 30	Lowe Int'l, HDM, BBDO, TBWA
Johnson & Johnson Silhouette, Serena	$ 32	Saatchi & Saatchi, London
3M various products	$ 36	HDM Int'l, Brussels; Grey, London; Grey, Milan; BSB Dorland, London
Olivetti computers	$ 50	Ogilvy & Mather, Milan
Beiersdorf Cosmed division*	$ 50	TBWA, N W Ayer, Burnett
Johnson Wax household/personal care*	$ 55	FCB, DDB Needham, both London
Johnson & Johnson o.b. tampon	$ 60	Saatchi & Saatchi, London
SEAT auto	$100	Ayer Int'l, Madrid
Sara Lee/Douwe Egberts various products*	$100	BBDO, Saatchi & Saatchi, HDM, BSB

* Figure is how much entire pan-European account worth, not necessarily how much moved.

Marketers proceed despite hazy future

(Continued from Cover)

viously included in the taxation. The U.K. furiously is fighting the plan, which would mean, for example, that families there would pay a value-added tax on children's shoes for the first time.

Tobacco marketers have their eye on a proposal to restrict the use of people and realistic settings in tobacco ads and to ban the use of tobacco-product brand names for non-tobacco products, such as lighters or fashion collections. Final approval is expected by yearend.

The regulatory clouds that could eventually control the amount of tar and nicotine in tobacco products could have a silver lining for multinational marketers.

As part of the drive to increase competition within the EC, the state-owned tobacco monopolies in France, Italy and Spain are being forced to allow international brands greater access to their countries.

Philip Morris Cos., British-American Tobacco, R.J. Reynolds Tobacco Co. and other marketers expect shares of their best-selling brands to increase on a Europewide basis, even as various marketing tools are taken away by the expected European bans.

One indirect result of directives harmonizing taxes and excise duties may be a ban on duty-free sales at airports, potentially damaging to spirits and tobacco marketers.

Those sales are likely to be transferred to domestic markets, where a strong international image can boost sales against less prestigious national brands. That prospect makes strong international branding important for distillers.

Anticipating this, Guinness-owned United Distillers, marketer of Johnnie Walker Scotch whisky and Gordon's gin, has identified a strong, consistent image as a marketing priority for Europe in 1992.

A September relaunch for Johnnie Walker in Europe began with the consolidation last month of its $25 million European account at WCRS Mathews Marcantonio, London.

"We [previously] had an adaptation of the American campaign" in the Netherlands, said Rob Hermans, managing director, United Distillers' European division. "In Spain, [the campaign] was Johnnie the 'Skywalker.' In Italy, we called it the 'Bambino.' All these campaigns had a different image; there was no unity."

Like United Distillers, General Motors is anticipating certain EC directives and is moving ahead.

GM decided to install catalytic converters on cars sold in West Germany because of anticipated stricter EC emission guidelines.

Besides dealing with European competitors, U.S. automakers must be prepared to face the Japanese.

Japanese automakers already have grabbed 11% of Europe's 13 million-unit new-car market, and experts predict that share will double by 1995.

Japanese auto market shares vary enormously within the EC. In France and Italy, strict local quotas for passenger car imports limit their shares to 3% and 0.7%, respectively. The U.K. and Germany impose no quotas.

How Japanese imports will be dealt with in 1992 is still unclear, but a single European quota looks likely. That probably means more Japanese penetration of the now-more restrictive markets.

GM Europe was set up three years ago in Zurich to coordinate the activities of national subsidiaries. The pan-European research—and subsequent design changes—seem to be working. The midsize Vectra (called Cavalier in the U.K. but not the same auto as the Cavalier sold in the U.S.) is expected to exceed first-year sales projections of 350,000 units. The model was launched in the fall.

The Vectra's suspension can handle the rough treatment of Germany's Autobahns yet delivers the smoother drive preferred in France, said Ken Levy, director of media relations for GM Europe.

Interior styling reflects the orderly look northern European drivers like, while lively colors and patterns for seat covers make the same car attractive to southern Europeans, Mr. Levy added.

Also, advertising has a more consistent look now. GM used Lowe International for the Vectra's U.K. and West German launches; McCann-Erickson, Zurich, adapted the campaign for other countries.

In the food arena, marketers' biggest concerns about coming directives are that they be specific and leave no room for varying interpretations.

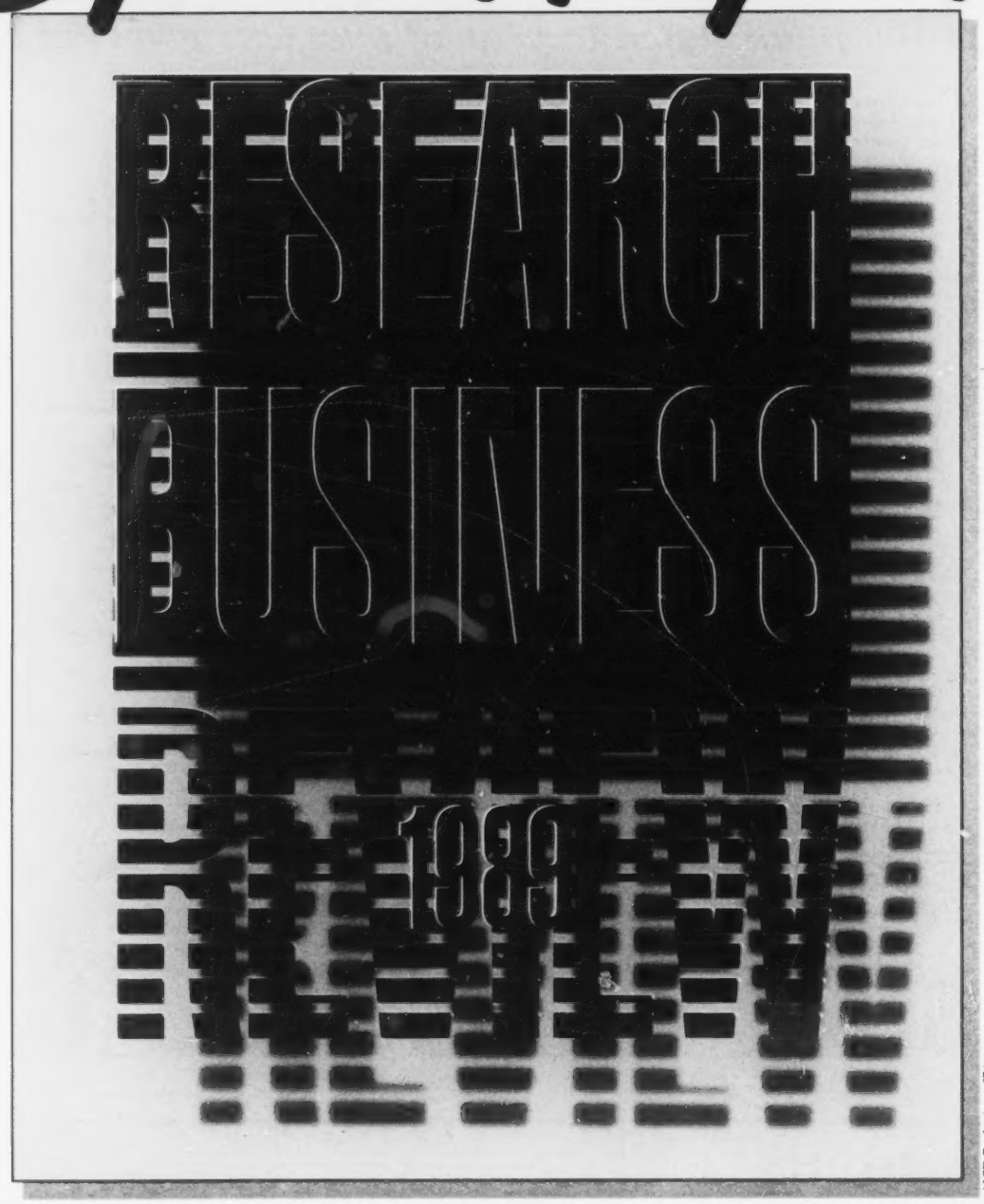
For example, when foods are labeled "fresh," marketers want clear direction on what comprises a fresh food. Another area certain to be regulated will be nutrient labeling, now controlled by each country.

So far, food marketers have been more involved in bidding wars for takeovers as rivals rush to acquire the critical mass they say they will need to compete in the new Europe.

Although there may be more action like Nestle's victory last year over Jacobs Suchard for control of U.K. confectioner Rowntree, many food companies still believe a more unified Europe will have little impact on their business.

Said Michael Sargent, marketing services manager at H.J. Heinz Co.: "My personal view is that a single Europe is not going to help us sell one tin of beans or a single bottle of ketchup."#

Special Report



AVID Productions, Chicago

Leading 50 researchers top $2.6 billion

Growth rate off a bit; D&B adds No. 2 company

By Jack J. Honomichl

Top line data from this, the 15th Annual Industry Review compiled exclusively for ADVERTISING AGE, show that:

- Combined revenues of the industry's Top 50 organizations were up 13.9% in 1988, but the growth rate was lower than that of 1987 (16.8%) and 1986 (16.2%).
- After adjustment for inflation, the Top 50's "real growth" was 9.8% compared to 13.2% in 1987 and 14.3% in 1986.
- The Top 50's growth rate was buoyed by revenues from outside the U.S. where inflation is relatively high and where the U.S. dollar continues to be weak vis-a-vis many major foreign currencies.
- After discussing the heady impact of foreign revenues, and based on the performance of 140 research organizations, for which I have 1987 to 1988 revenue data, it seems that the growth of expenditures for research services within the U.S. grew about 7.8% in 1988, or 3.7% after accounting for inflation.
- Total expenditures for research in the U.S. in 1988, including work done by non-profit research organizations and agencies of the federal government in-house, were slightly over $2.1 billion.
- The biggest research story of 1988 was the acquisition of IMS International (No. 2 on the list) for $1.7 billion by Dun & Bradstreet Corp. This, plus the acquisition in 1984 of A.C. Nielsen (No. 1), gives D&B control of the two largest research organizations in the world and more than $1.2 billion in research revenues, about $524 million of which is in the U.S.

The main element in this analysis comes from the 1987 to 1988 revenue records of 50 leading U.S. marketing/advertising/public opinion research organizations, which in aggregate had worldwide revenues of more than $2.6 billion in 1988, up 13.9% over 1987.

After adjustment for inflation (4.1% in 1988, according to the U.S. Department of Labor Consumer Price Index-U monthly average), this melts down to a "real growth" rate of 9.8%.

Of the Top 50's $2.6 billion in revenues, $888.2 million, or 34%, came from operations outside the U.S. (vs. 31.8% in 1987).

Five major organizations—Nielsen, IMS, Research International, MRB Group and Louis Harris & Associates—got more than half of their revenues from outside the U.S.

When I eliminate the overseas revenues of these five organizations, the Top 50 list shows a growth rate of 8.3% in 1988, or 4.2% after adjustment for inflation.

Another set of depreciating data comes from the Council of American Survey Research Organizations, which shows that 90 members other

(Continued on Page S-2)

Jack J. Honomichl is ADVERTISING AGE's *research columnist.*

Top 50 research companies listed

Changes, expansion plans noted in year of overseas growth and acquisitions

RANK 32

ABT Associates

Cambridge, Mass.
Research revenues: **$10.1** million
Percent change: **24.3%**

This organization, which specializes in technical and economic analyses, mostly for the federal government, had total revenues of $37.8 million, of which 27%, or $10.1 million, was derived from market research activities, including focus groups, mail surveys, in-person interviews and telephone surveys.

Ad hoc surveys and consultation in customer satisfaction surveys account for about 45% of research volume. Other services include strategic marketing, concept tests, corporate image and positioning, market assessment and segmentation, new-product forecasting, market information systems, training and human resources management and productivity.

Fields of specialization include financial services, healthcare, insurance, automotive, high technology, travel and lodging and telecommunications.

A central telephone interviewing facility in Amherst, Mass., has a 100-station capacity, with on-line monitoring and a 32-station network of CATI terminals.

Senior VP, Business Research and Consulting Group, is Wendell Knox, 41.

RANK 35

Admar Research

New York
Research revenues: **$9.8** million
Percent change: **2.1%**

Admar specializes in consumer tracking studies, product testing and advertising studies that employ copyrighted methodologies.

Revenues include those of two field affiliates, Market Trends and Survey Research. The two field interviewing offices have a 55 interviewing stations.

The company has 52 full-time employees. Henry Ostberg is chairman-president.

RANK 3

Arbitron/SAMI/Burke

Minneapolis
Research revenues: **$320.0** million*
Percent change: **-1.5%**

This conglomerate is divided into two units: Arbitron Co., New York, which includes SAMI as of 1988, and Burke Marketing Services, Cincinnati.

Burke, which had revenues estimated at $73 million in 1987, is in the process of being acquired by its management group. Included are Bases, Burke Marketing Research, Burke Canada, Burke International Research, Test Marketing Group and Burke Institute. This transaction is expected to be finalized in the near future.

The main operation, Arbitron Co., provides syndicated radio audience measurement service in 259 markets, using mail diaries, and TV/cable measurements in 213 markets, using a combination of mail diaries and meter or people meter-equipped households. In addition to printed reports, radio and TV stations, advertisers and agencies may receive audience data through computer-based electronic book systems.

Starting in 1989, Arbitron will produce Hispanic Reports for 16 separate markets.

Arbitron is expanding its ScanAmerica single-source service, which electronically measures TV viewing via people meters and product purchases via an in-home scanner device that "reads" UPC bar codes. Now available in Denver, ScanAmerica service is planned for New York, St. Louis, Sacramento-Stockton and Minneapolis-St. Paul in 1990, and Phoenix in 1991.

Arbitron's SAMI division provides product movement reports for 54 SAMI-defined marketing areas based on warehouse withdrawal data from supermarkets, drugstores and mass merchandisers. A companion service, Samscan, produces product movement data measured by UPC scanning in 35 SAMI-defined markets and a total of 2,100 supermarkets.

SAMI also maintains a data base of causal data, which includes free standing inserts, couponing and store features. Clients can receive SAMI product data via DecisionMaster, a PC-based analytical system.

The Burke Marketing Services unit specializes in field and tab, full-service survey research, TV copy testing, market modeling, single source test-marketing facilities and training seminars for research professionals.

The company employs 3,700.

Arbitron/SAMI/Burke reports to David P. White, 51, president of CDC's Business Services Group. Arbitron Co. President A.J. "Rick" Aurichio is 51. Jack Brown, 45, is president of Burke Marketing Research.

* Revenues do not include Broadcasting Advertisers Reports and Radio-TV Reports, acquired by Arbitron in 1987.

About 1% or $3.3 million in 1988 revenues were generated from business outside the U.S.

RANK 25

ASI Market Research

New York
Research revenues: **$14.8** million
Percent change: **-11.4%**

In early 1988, IDC Services, ASI Market Research's parent company, was acquired by Apollo Partners, a private company founded by former top Viacom executives. The revenue decline from 1987 was largely due to the prolonged Writers Guild strike. The strike curtailed TV pilot show production, and a significant segment of ASI's revenue comes from pre-testing pilots.

ASI concentrates in testing TV commercials and print ads and evaluating entertainment projects such as TV shows and movie films.

Persuasion Plus, ASI's TV commercial testing system, is based on Tru-Share, its validated measurement of persuasive impact. Both Persuasion Plus and ASI's other commercial testing service, Recall Plus, are CATV-based and operate in 11 to 15 cities. ASI's Apex system fuses recall, persuasion and diagnostics. In 1988, the company introduced Attention/Linkage Analysis, a recall model for copy testing. It also opened a new 120-station telephone interviewing facility in Great Bend, Kan.

ASI has 71 salaried exempt and 425 non-exempt employees. Sales/service offices are located in Chicago and Los Angeles. Gerald Lukeman, 57, is president-ceo.

RANK 27

Birch/Scarborough Research

Coral Springs, Fla.
Research revenues: **$13.2** million
Percent change: **17.9%**

Birch Radio, which in February received Electronic Media Radio Council accreditation, develops syndicated radio audience ratings. It uses a telephone-based methodology and monitors more than 250 markets, 109 of which are measured continuously.

Birch quarterly summary reports include qualitative and product usage data, cross-media comparisons, standard demographic analy-

Wendell Knox
ABT Associates

Henry Ostberg
Admar Research

A.J. Aurichio
Arbitron

Gerald Lukeman
ASI

Thomas Birch
Birch/Scarborough

Leading researchers

(Continued from Page S-1)

than those listed in the Top 50 had combined revenues of $220 million in 1988, up 3.8% over 1987.

Most of these companies are too small to make the Top 50 listing, or for some other reason did not qualify.

By adding the Top 50 to the CASRO group, we have the records of 140 research organizations ranging from huge worldwide conglomerates down to some with revenue in the $500,000 range. In total, their 1988 revenues were more than $2.8 billion, of which 31.4% came from outside the U.S.

After deducting the overseas revenues of Nielsen, IMS, Research International, MRB and Harris, this 140-company list shows a growth rate of 7.8% in 1988, and just 3.7% after adjustment for inflation. This is probably the best approximation of how much more was spent for research services within the U.S. in 1988 through for-profit organizations.

To determine the size of the U.S. marketing/advertising/public opinion research market in 1988, take the 140-company total of $2.8 billion and subtract the $888.2 million coming from overseas; that leaves more than $1.9 billion. From that apply a 5% deflation factor to account for subcontracting, a common industry practice.

For instance, one of the Top 50, Mediamark, uses another Top 50 company, Chilton, to do all the field work in its annual study of magazine readership in 10,000 households.

By adding the revenues of Mediamark to those of Chilton, we are in effect taking that part of client expenditures for Mediamark's study and counting it twice. The 5% deflation factor is a conservative estimate, but probably close to the truth of the matter if that could be determined accurately. This brings the U.S. expenditures through for-profit companies down to more than $1.8 billion.

To arrive at the total market, add in about $270 million to account for research done by non-profit research organizations affiliated with universities (for example, NORC at the University of Chicago or the Survey Research Center at the University of Michigan), research done in-house by agencies of the federal government and in-house by some major advertisers.

This process produces an estimated size of a research market of slightly more than $2.1 billion in 1988.

There are few changes in the 1988 list from that of 1987. Revenues of Cambridge Reports are now included in those of Research International, because of acquisition. Gallup Organization is out because of acquisition by Selection Research Inc., Lincoln, Neb.

Directions for Decisions' revenues dropped below $5 million.

Three companies new to the list are Intersearch Corp., Marketeam/Doane Marketing Research and ABT Associates.

Beyond that, the most striking development in 1988 was the effort of numerous U.S. researchers to expand their business outside the U.S. through joint ventures, licensing agreements or direct sales of services. Included in this group are M/A/R/C Inc., Information Resources Inc., Custom Research, J.D. Power & Associates, McCollum/Spielman, National Research Group and Elrick & Lavidge.

The flip side is continued growth in the number of U.S. research organizations that are owned by non-U.S. (mostly British) corporations. The Top 50 list of 1988 contains eight: MRB Group, Yankelovich Clancy Shulman, Millward Brown (ex-Ad Factors), Field Research Corp., National Research Group, Mediamark, NFO Research and Birch/Scarborough. Together, these companies had revenues of $198.3 million in 1988.

As in previous years, the 1988 revenues for each of the Top 50 organizations are actual and may include revenues gained from acquisitions during the year, as explained in the profiles.

But the growth rates of the Top 50, as much as possible, have been calculated on a comparable base from year to year.

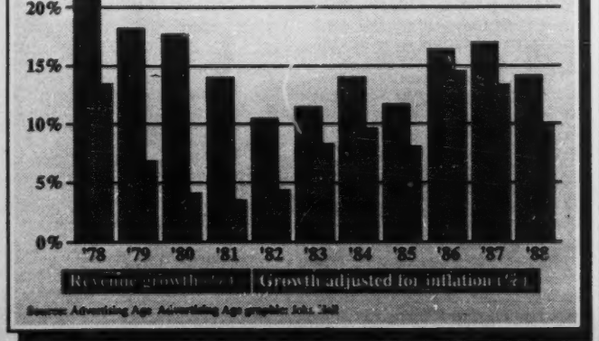
So, if company A bought company B during 1988, company A's growth rate is calculated on its revenues of 1988 plus those of company B for 1988 vis-a-vis a comparable base in 1987 (just the opposite was done in cases of divestiture). If this procedure were not followed, the industry growth rate would appear to be much higher but would be to some degree merely a reflection of acquired revenues.

Also, as in past listings, the revenues for the Top 50 are for research activities only. Certain companies, as explained in the individual company profiles, have significant additional revenues from non-research activities.

The company-by-company profiles that begin above detail the operations of each of 1988's Top 50 research shops, major changes that took place in 1988 and their expansion plans for the remainder of 1989. □

Top 50 companies' growth slows

Total revenue growth—after being adjusted for inflation—of the top 50 U.S. research companies dropped from 13.2% in 1987 to 9.8% in 1988



Top 50 U.S. research organizations

Rank 1988	Rank 1987	Organization	Research revenues 1988 total	'88-'87 % chg	Address	Telephone	Top executive, title
1	1	**A.C. Nielsen***	**$880.0**	20.5	Nielsen Plaza, Northbrook, Ill. 60062	(312) 498-6300	John Holt, chmn-ceo
2	3	**IMS International***	**365.0**	22.0	800 Third Ave., New York 10022	(212) 371-2310	Serge Okun, president-ceo
3	2	**Arbitron/SAMI/Burke**	**320.0**	(1.5)	8100 34th Ave. South, Minneapolis 55440-4700	(612) 853-8100	A.J. Aurichio, president
4	4	**Information Resources**	**129.2**	22.5	150 N. Clinton St., Chicago 60606	(312) 726-1221	John Malec, chmn
5	5	**Research International**	**103.4**	9.1	26a Great Peter St., London SW1P 2BX	01-799-2363	Ian Hunt, ceo
6	7	**MRB Group**	**78.2**	28.0	380 Madison Ave., New York 10017	(212) 916-8985	Frank Stanton, chmn-ceo
7	6	**WESTAT**	**64.3**	5.3	1650 Research Blvd., Rockville, Md. 20850-3129	(301) 251-1500	Joseph Hunt, president-ceo
8	8	**M/A/R/C Inc.**	**51.1**	1.6	7850 North Belt Line Rd., Irving, Texas 75063	(214) 506-3400	Cecil Phillips, chmn-ceo
9	9	**NFO Research**	**40.9**	5.1	2 Pickwick Plaza, Greenwich, Conn. 06830	(203) 629-8888	William Lipner, pres-ceo
10	10	**Maritz Marketing Research**	**39.9**	4.7	1395 N. Highway Drive, Fenton, Mo. 63026	(314) 827-2325	William Lewellen, president
11	11	**Market Facts**	**37.8**	1.0	676 N. St. Clair St., Chicago 60611	(312) 280-9100	Verne Churchill, ceo
12	12	**Elrick & Lavidge**	**31.4**	4.9	10 S. Riverside Plaza, Chicago 60606	(312) 726-0666	J. Edward Shrawder, pres.
13	13	**NPD Group**	**29.8**	16.0	900 W. Shore Rd., Port Washington, N.Y. 10050-0402	(516) 625-0700	Tod Johnson, president-ceo
14	14	**Yankelovich Clancy Shulman**	**24.5**	(6.2)	8 Wright St., Westport, Conn. 06880	(203) 227-2700	Robert Shulman, president-ceo
15	15	**Chilton Research Services**	**23.7**	11.8	1 Chilton Way, Radnor, Pa. 19089-0193	(215) 964-4606	Marjorie Michitti, vp-gen mgr
16	16	**Walker Research**	**21.7**	8.0	3939 Priority Way South Dr., Indianapolis 46280-0432	(317) 843-3939	Frank Walker, chmn-ceo
17	17	**Louis Harris & Associates**	**19.4**	4.3	630 Fifth Ave., New York 10111	(212) 698-9600	Louis Harris, chmn-ceo
18	28	**Starch INRA Hooper**	**19.0**	8.4	566 E. Boston Post Rd., Mamaroneck, N.Y. 10543	(914) 698-0800	William Wilson, president-ceo
18	NA	**Intersearch Corp.**	**19.0**	25.3	132 Welsh Rd., Horsham, Pa. 19044-0189	(215) 657-6400	Alan Widra, chmn-president
20	22	**Pharmaceutical Data Services**	**18.3**	30.7	P.O. Box 52115, Phoenix 85072-2115	(602) 391-4731	Sheldon Silverberg, president
21	19	**Opinion Research**	**17.2**	9.6	P.O. Box 183, Princeton, N.J. 08542-0183	(609) 924-5900	Andrew Brown, president-ceo
22	21	**National Analysts**	**15.3**	5.5	400 Market St., Philadelphia 19106	(215) 627-8110	Marshall Greenberg, president
23	20	**Harte-Hanks Marketing Services**	**15.0**	2.0	65 Route 4, River Edge, N.J. 07661-1924	(201) 342-6400	Richard Hochhauser, president
24	23	**Decision Research**	**14.9**	14.6	33 Hayden Ave., Lexington, Mass. 02173	(617) 861-7350	Eric Almquist, gen mgr
25	18	**ASI Market Research**	**14.8**	(11.4)	79 Fifth Ave., New York 10003	(212) 807-9393	Gerald Lukeman, president-ceo
26	24	**National Research Group**	**14.2**	23.5	7046 Hollywood Blvd., Los Angeles 90028	(213) 856-4400	Joseph Farrell, chmn-ceo
27	26	**Birch/Scarborough Research**	**13.2**	17.9	12350 NW 39th St., Coral Springs, Fla. 33065-2404	(305) 753-6043	Thomas Birch, chmn-ceo
28	27	**Mediamark Research**	**13.0**	16.1	341 Madison Ave., New York 10017	(212) 599-0444	Timothy Joyce, chmn-ceo
29	33	**Market Opinion Research**	**11.4**	34.0	243 West Congress, Detroit 48826	(313) 963-2414	Frederick Currier, chmn-ceo
30	25	**Custom Research**	**10.8**	(5.3)	10301 Wayzata Blvd., Minneapolis 55426-0695	(612) 542-0800	Jeffery Pope, partner
31	29	**Data Development**	**10.4**	4.0	120 Fifth Ave., New York 10011	(212) 633-1100	Jerry Rosenkranz, chmn
32	NA	**ABT Associates**	**10.1**	24.3	55 Wheeler St., Cambridge, Mass. 02138	(617) 492-7100	Wendell Knox, sr vp
33	36	**Wirthlin Group**	**10.0**	26.0	1363 Beverly Rd., McLean, Va. 22101	(703) 556-0001	Richard Wirthlin, chmn
34	37	**J.D. Power & Associates**	**9.9**	30.1	30401 Agoura Rd., Agoura Hills, Calif. 91301	(818) 889-6330	J. David Power III, president
35	31	**Admar Research**	**9.8**	2.1	304 Park Ave. South, New York 10010	(212) 677-1700	Henry Ostberg, chmn-president
36	32	**McCollum/Spielman International**	**8.9**	2.6	235 Great Neck Rd., Great Neck, N.Y. 11021	(516) 482-0310	Donald McCollum, chmn
37	38	**Lieberman Research West**	**8.8**	27.6	1900 Avenue of the Stars, Los Angeles 90067	(213) 553-0550	Arnold Fishman, chmn
38	39	**Millward Brown Inc.**	**8.6**	30.3	751 Roosevelt Rd., Glen Ellyn, Ill. 60137	(312) 858-3760	Robert Meyers, president-ceo
39	34	**Guideline Research**	**8.2**	(3.5)	3 W. 35th St., New York 10001	(212) 947-5140	Norman Passman, president
40	44	**Total Research**	**7.5**	33.9	5 Independence Way, Princeton, N.J. 08540	(609) 921-8100	Lorin Zissman, president-ceo
41	40	**Kapuler Marketing Research**	**6.9**	5.2	3436 N. Kennicott Ave., Arlington Heights, Ill. 60004	(312) 870-6700	Stanley Kapuler, president
42	42	**Conway/Milliken & Associates**	**6.8**	13.8	875 N. Michigan Ave., Chicago 60611	(312) 787-4060	Foy Conway, ceo
43	35	**Response Analysis**	**6.7**	(16.0)	377 Wall St., Princeton, N.J. 08542	(609) 921-3333	James Fouss, president
44	46	**CLT Research Associates**	**6.5**	20.3	345 Park Ave. South, New York 10010	(212) 779-1900	Lowell Allen, president
45	41	**Marketing Research Services**	**6.3**	(1.0)	15 E. Eighth St., Cincinnati 45202	(513) 579-1555	Edward Horgan, president-ceo
45	45	**Newman-Stein**	**6.3**	14.6	902 Broadway, New York 10010	(212) 777-2700	William Stein, partner
47	43	**Vanderveer Group**	**6.1**	5.2	555 Virginia Drive, Fort Washington, Pa. 19034	(215) 646-7200	Richard Vanderveer, chmn
48	49	**Field Research**	**5.7**	9.6	234 Front St., San Francisco 94111	(415) 392-5763	Aaron Levy, president-ceo
49	50	**Oxtoby-Smith**	**5.0**	(3.0)	215 Park Ave. South, New York 10003	(212) 614-0040	Joseph Smith, president
49	NA	**Marketeam/Doane Marketing Rsch**	**5.0**	11.6	555 North New Ballas Rd., St. Louis 63141	(314) 569-1324	Carl Block, president-ceo
		Subtotal-top 50	**2,609.9**	**13.9**			
		All other**	**220.0**	**3.8**			
		Total: 140 organizations	**2,829.9**	**13.0**			

Notes: Dollars are in millions. For more information (including revenues from non-research activities), see profiles of top 50 U.S. research organizations, beginning on Page S-2. Percent change figures are pro forma, to account for acquisitions. * Indicates that company revenues are AA estimates. ** Includes revenues of 90 survey research firms (not in top 50) that provide financial information on a confidential basis to the Council of American Research Organizations (CASRO). **Source:** Advertising Age.

Marjorie Michitti
Chilton

Lowell Allen
CLT Research

Foy Conway
Conway/Milliken

Jeffery Pope
Custom Research

Jerry Rosenkranz
Data Development

Eric Almquist
Decision Research

J.E. Shrawder
Elrick & Lavidge

Aaron Levy
Field Research

Norman Passman
Guideline

sis and daypart audience estimates.

Birch Radio also offers Target Market Reports, including analysis of black listenership in 41 markets and Hispanic in 16 markets. Its Airline Target Market Reports cover 101 markets.

The Birch/Scarborough Multi-Media Consumer Profile service annually studies retail shopping, product and service usage of radio, TV and newspaper audiences in 30 top markets.

Birch has 145 full-time employees and about 600 part-timers in its corporate office, four sales/marketing offices and six telephone interviewing facilities.

The company's majority interest is owned by VNU Business Information Services, a unit of United Dutch Publishing Cos., Haarlem, The Netherlands.

Thomas Birch, 36, is chairman-ceo; William Livek, 34, is president-chief operating officer.

RANK 15

Chilton Research Services

Radnor, Pa.
Research revenues: **$23.7** million
Percent change: **11.8%**

Early this year Chilton, an ad hoc custom marketing research company, introduced Easy Access. The software package connects client PCs to Chilton's mainframe, providing instant information 24 hours a day.

The company is organized into specialty groups focusing on telecommunications, computers, business-to-business, customer satisfaction measurements, entertainment, transportation, utilities and retailing.

An in-house statistical group is dedicated to modeling/forecasting and statistical analysis. A field department handles large-scale personal interview projects and election and exit-poll surveys for ABC News.

Chilton operates dedicated telephone interviewing centers for customer satisfaction studies for four Baby Bell companies; one unit is dedicated to training telephone company customer service reps using custom simulated role-playing techniques.

The company has three interviewing centers with a total of 168 positions, all CATI-equipped. The CATI system incorporates on-line sample control and interactive cross tabulations. Chilton has 218 full-time salaried employees.

Marjorie Michitti, 39, is VP-general manager of Chilton Research, a wholly owned subsidiary of Capital Cities/ABC.

RANK 44

CLT Research Associates

New York
Research revenues: **$6.5** million
Percent change: **20.3%**

CLT Research, a full-service custom survey company, does strategy research, market segmentation, concept/product testing, positioning research and tracking/test market surveys for both consumer product and business-to-business clients. It emphasizes package goods and financial services.

CLT also is involved in respondent-interactive computerized interviewing, offering instant data retrieval along with controlled interviewing environments and digital translation of concepts, storyboards, or story-matic commercials; customer satisfaction surveys; and international research coordinated through its New York office, an activity that will be expanded in 1989 through an international network established in 1988.

There are 50 employees, CLT is jointly headed by President Lowell Allen, 46, and Leslie Moran, 46.

RANK 42

Conway/Milliken & Associates

Chicago
Research revenues: **$6.8** million
Percent change: **13.8%**

Conway/Milliken & Associates, a custom survey company, specializes in concept development and evaluation; product research covering sensory and in-home testing; ingredient screening and RSM product optimization, and continuous tracking and telephone research for consumer products. This year the company plans to launch a promotions research group.

During 1988, CMA organized a consulting group, which includes Q-Team Qualitative, Developmental Workshops and Super Group consumer idea generation.

The company also introduced Fitest last year. The quantitative service measures fit/congruence between concept and product.

It has two central telephone interviewing facilities: one with 30 stations in Chicago and one with 50 stations in St. Louis. All are CRT-equipped. The company employs 70 full-time salaried workers.

Founder Foy Conway, 58, is ceo.

RANK 30

Custom Research

Minneapolis
Research revenues: **$10.8** million
Percent change: **-5.3%**

This custom survey company is organized into six divisions, including the Consumer Research division, Corporate Services division and Medical Research Bureau.

Its Custom Research Telephone division offers central telephone WATS interviewing, with 50 CRT-equipped stations located in St. Paul, Minn. In 1988, the company's Custom Research International contracted with NOP Market Research, London, to make available in the U.K. CRI's Critique prediction model and Criterion concept testing methodology.

CRI's Services Research Group markets a service called Service Quality Audit to evaluate customer satisfaction. CRI has 70 full-time salaried employees—plus 150 part-timers—and service offices in Union, N.J., Chicago and San Francisco.

It is managed by two partners, Judith Corson, 44, and Jeffery Pope, 48.

RANK 31

Data Development

New York
Research revenues: **$10.4** million
Percent change: **4.0%**

This full-service, custom survey research organization includes Data Development Corp., New York; New Rochelle (N.Y.) Conference Center; and The Telephone Center, with facilities in New Rochelle and, new in 1989, Greensboro, N.C. In total, these phone interviewing facilities have 105 stations, 90 of which are CRT-equipped. In 1988, it divested another unit, New York Conference Center, and the growth rate has been adjusted accordingly.

DDC, with 75 full-time employees, concentrates on strategic and market structure studies, tracking surveys, product/service positioning and product testing. Proprietary methodologies include: Copy II (copy strategy); Adopter (total brand equity); and Marketscore (in-depth study of food service market). New services in 1989: Copy IIA and Satisfind (a customer satisfaction measurement system).

During 1988, DDC relocated its headquarters office. Jerry Rosenkranz, 53, is chairman and Joseph Goldstein, 53, is president-ceo.

RANK 24

Decision Research

Lexington, Mass.
Research revenues: **$14.9** million
Percent change: **14.6%**

In 1989, this full-service research company plans to expand its work in buyer decision-making research, including discrete choice modeling and brand equity studies.

DRC currently specializes in custom ad hoc survey work for consumer goods and business-to-business marketers. Industry specializations include computer, telecommunications, professional service companies (including ad agencies), financial, healthcare, travel and leisure, package goods, utilities, media and direct marketing.

Decision Research also conducts market research training seminars emphasizing the interaction of qualitative and quantitative techniques. DRC also conducts jury simulation panels for legal clients, including running mock trials.

A division of Temple, Barker & Sloane, a subsidiary of Marsh McLennan Cos., DRC has 75 full-time employees in four offices. Offices in Atlanta and San Francisco were added in 1988 to existing locations in Lexington, Mass., and New York. Eric Almquist, 41, is general manager.

RANK 12

Elrick & Lavidge

Chicago
Research revenues: **$31.4** million
Percent change: **4.9%**

Elrick & Lavidge's revenues include those of subsidiary Quick Test Opinion Centers, Philadelphia. This national network of 25 mall interviewing sites accounts for about 38% of E&L revenues.

Late in 1988, Quick Test acquired Field Facts, Framingham, Mass., a field interviewing service with 14 locations. These are now being merged into the Quick Test organization, and Field Facts' 1988 revenues have not been factored into E&L's figures.

During 1988, E&L entered into a joint venture with Advertising Research Corp., Berkeley Heights, N.J., to launch a syndicated service that measures Yellow Page readership. Also, Quick Test set up a joint venture with Field Facts U.K., the first step in developing a European field service organization.

E&L specializes in survey research for consumer product and business-to-business clients through full-service offices in Atlanta, Chicago, Cincinnati, Downers Grove, Ill., Los Angeles, Paramus, N.J., and San Francisco. Combining personnel in these offices and field facilities, E&L employs a full-time salaried staff of about 225 and about 850 part-timers.

E&L operates four telephone interviewing facilities with more than 300 stations, about 57% of which are CATI-equipped.

J. Edward Shrawder, 52, is E&L's president; Sanford Schwartz, 37, is president of Quick Test.

RANK 48

Field Research

San Francisco
Research revenues: **$5.7** million
Percent change: **9.6%**

Recently purchased by London-based KLP Group, this full-service, custom survey research company mainly focuses on ad hoc projects for clients in the following areas: utilities, health services, petroleum products, financial services, high-tech electronics, consumer products and services, print and broadcast media, retail chains, state government and law firms.

The Field Institute, a division within FRC that accounts for about 10% of revenues, publishes The California Poll, a public opinion news service that provides syndicated reports to California newspapers and TV stations, and The California Opinion Index, which performs surveys related to public policy issues.

FRC also operates a custom-designed audience measurement service for sports broadcasts on radio. Clients include radio flagship stations and major sports franchises.

The company has 75 full-time salaried employees in two offices, San Francisco and Los Angeles. It has two central telephone interviewing centers with a total of 80 stations, most of which are CATI-equipped.

President-ceo is Aaron Levy, 54; founder Marvin Field, 67, is chairman.

RANK 39

Guideline Research

New York
Research revenues: **$8.2** million
Percent change: **-3.5%**

Guideline Research Corp. specializes in custom market research—concept product tests, AAU tracking studies, TV copy research, product and corporate strategic and image studies, industrial research, advertising claim substantiation studies and magnitude estimation to optimize product development.

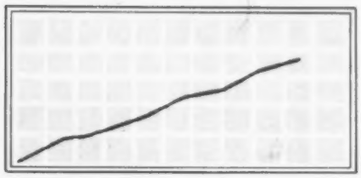
During 1988, GRC created a legal services division to provide custom studies for use in trademark, infringement or claim substantiation proceedings.

GRC includes Guideline Research, Topline Research, Guideline-West, and Tabline Tabulating Services.

The company has more than 50 full-time salaried employees in offices in New York and Los Angeles. It intends to open another branch office this year.

GRC is headed by President Norman Passman, 56, and Jay Friedland, 49.

MARKETING RESEARCH



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RANK 23

Harte-Hanks Marketing Services

River Edge, N.J.
Research revenues: **$15.0** million
Percent change: **2.0%**

Harte-Hanks Marketing Services is a unit of Harte-Hanks Communications' Harte-Hanks Direct Marketing subsidiary.

The unit's Custom Research division offers full-service survey work, specializing in communications, retail and financial research, especially as they relate to direct marketing.

In 1988, Urban Data Processing, Billerica, Mass., an EDP Service bureau that provides data-base processing for marketing and research applications, was renamed Harte-Hanks Technologies.

Two new services from the company are CIS Direct and P/CIS; they offer financial institutions a direct-marketing data base with research capabilities and desktop market research applications.

Richard Hochhauser, 44, is president of Harte-Hanks Direct Marketing and its Marketing Services Group.

RANK 17

Louis Harris & Associates

New York
Research revenues: **$19.4** million*
Percent change: **4.3%**

U.S. operations of this Gannett Co. survey research subsidiary are broken into divisions, including telecommunications, computers, healthcare, banking and financial services, automobiles, public policy and corporate affairs.

About 40% of Louis Harris' work in the U.S. is for foundations, governmental agencies and other nonprofit entities.

A new joint venture, Harris/Scholastic Research, specializes in marketing and social research among school children. Multi-client surveys track corporate, financial, public and leadership opinions and behavior.

Founder Louis Harris syndicates a column in 150 newspapers.

Richard Hochhauser
Harte-Hanks

Louis Harris
Louis Harris

Serge Okun
IMS

John Malec
IRI

Alan Widra
Intersearch

Stanley Kapuler
Kapuler

About 57% of LHA revenues come from European subsidiaries: Harris Research Centre and Louis Harris Medical Surveys in London and Louis Harris France in Paris.

Harris also has conducted numerous survey projects outside the U.S., most recently in China, Poland, Hungary, Zimbabwe, Senegal, Jamaica and Latin America.

The New York office has 100 full-time salaried employees and a central telephone interview facility with 40 CATI-equipped stations.

Louis Harris, 68, is chairman-ceo; Humphrey Taylor, 54, is president-chief operating officer.

* 57.2% or $11.1 million of 1988 revenues were generated by activities outside of the U.S.

RANK 2

IMS International

New York
Research revenues: **$365.0** million*
Percent change: **22%**

This pharmaceutical industry researcher, a wholly owned subsidiary of Dun & Bradstreet Corp. since 1988, receives only about 40% of its revenues from U.S. operations. About $220 million comes from operations in 40 other countries.

IMS measures consumption of pharmaceutical and other healthcare products, evaluates physicians' prescribing patterns and provides services to help pharmaceutical companies manage their sales forces.

Basic services include pharmacy sales reports, which measure prescription and over-the-counter drug sales in more than 60 countries, and medical indices, which provide data on the patterns and treatments of diseases based on the records of practicing physicians in 40 countries. Data is made available to multinational pharmaceutical manufacturers through Multinational Integrated Data Analysis System, which provides electronic access to 18 national data bases.

In 1988, IMS began collecting pharmacy sales information in six West African countries. Another new service, Post Marketing Surveillance, monitors large numbers of patients taking a new drug.

Sales management services include Sales Territory Report, which is available in 19 countries and measures sales and market share at the territory level; SalesTab, an online version of Sales Territory Report; Call Reporting, which enables clients to track sales rep contacts with physicians; Profiling, which provides targeted information such as practice characteristics and prescribing preferences; and Territory Planner, a computerized sales training program.

In 1989, IMS will introduce Territory Manager, a data base service for sales representatives using laptop computers.

IMS market research operations employ about 3,600 employees.

Serge Okun, 42, is IMS president-ceo, reporting to Dun & Bradstreet President-Chief Operating Officer Robert Weissman.

* Some 60% of IMS' 1988 revenue, or $220 million, was derived from international activity.

RANK 4

Information Resources Inc.

Chicago
Research revenues: **$129.2** million*
Percent change: **22.5%**

Information Resources Inc. activities are compartmentalized into five areas:

The BehaviorScan system is a network of single-source data collection facilities in eight mini-markets. The network collects data via UPC scanning-equipped grocery and drugstores and household panels. It also offers the ability to target TV commercials to specific households. BehaviorScan facilities are used to test consumer promotions, advertising and product introductions.

Early in 1989, IRI announced plans to close down two BehaviorScan markets, Salem, Ore., and Rome, Ga. In West Germany, IRI operates a BehaviorScan facility via a joint venture with GfK GmbH.

InfoScan is a syndicated tracking service—both national and in 28 local markets—that provides weekly reports on product movement, share of market and promotional activity based on data from 2,380 stores.

Through a companion service, InfoScan provides household purchase information on 60,000 households clustered around a group of metro-sampling pods and BehaviorScan mini-markets. Tracking household purchases permits further diagnosis of factors such as trial and repeat, buyer demographics, brand loyalty, etc.

Decision Support Systems' main product is Express, a software product that applies to marketing, finance and corporate planning and analysis.

Survey Based Services accounted for about $11 million of IRI's 1988 revenue. Assessor is a simulated test market service to evaluate new-product concepts and sales potential without full-scale test marketing. Early in 1989, IRI announced plans to divest or close Data Group, a telephone survey unit, and the Custom Projects Group.

IRI's acquisition of ABA Group increased its store/shelf management activity with the Apollo retail store management system, now being integrated into the main IRI organization.

During 1988, IRI acquired Javelin Software Corp. in a transaction finalized in the first quarter of '89. Also in 1988, IRI entered into a joint venture, EuroScan GmbH, a company designed to develop market-measure services and management information services in Europe.

John Malec, 44, is chairman; Gian Fulgoni, 41, is vice-chairman-ceo.

* Revenues include $18.3 million from outside the U.S., up 121% from 1987 and accounting for 14.2% of total revenues.

RANK 18

Intersearch Corp.

Horsham, Pa.
Research revenues: **$19.0** million*
Percent change: **25.3%**

A full-service custom research organization, Intersearch provides a range of qualitative and quantitative collection methodologies. It conducts focus groups, teleconferences, telephone interviews—through five satellite interviewing centers with 300 WATS stations, half equipped for CRT interviewing, personal interviews and mall intercept studies; one mall facility has a test kitchen.

Areas of specialization include medical and healthcare, computers, business-to-business and consumer products. Intersearch also is involved in veterinary products, casino research, political polling, tracking studies, new-product concept evaluations and marketing and promotional strategies.

The company has 153 full-time employees and more than 600 part-timers.

Alan Widra, 57, is chairman-president.

* Revenues do not include non-research subscribers to an independent long-distance telephone company operated by Intersearch.

RANK 41

Kapuler Marketing Research

Arlington Heights, Ill.
Research revenues: **$6.9** million
Percent change: **5.2%**

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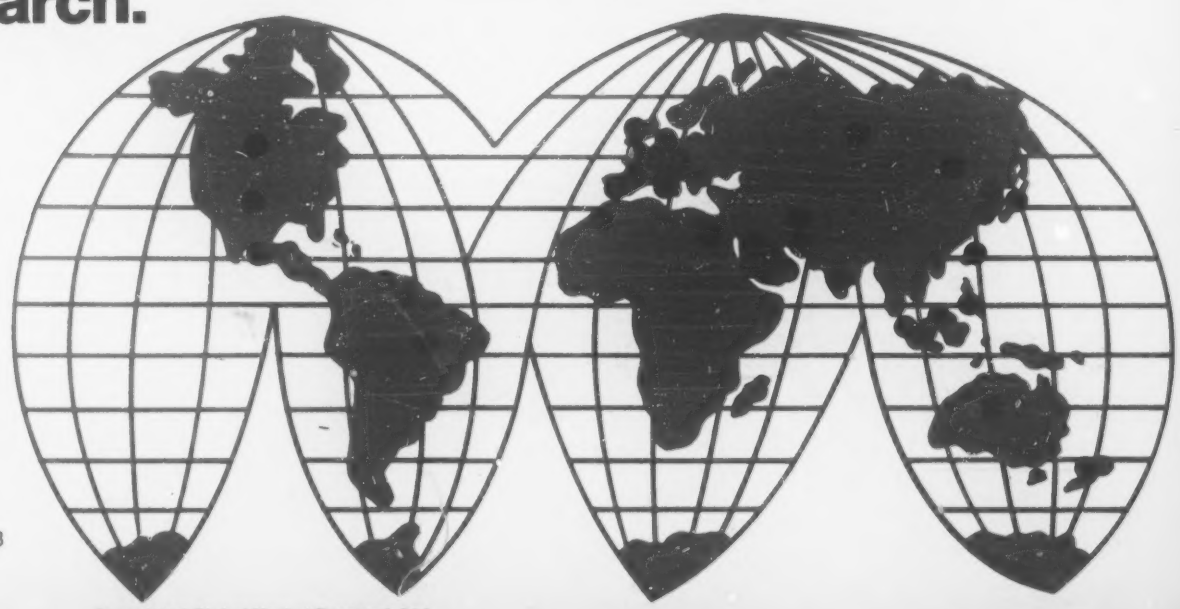

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Frederick Currier
MOR

William Lewellen
Maritz

Harold Spielman
MSI

puler Marketing Research offers quantitative and qualitative surveys.

In 1989, Kapuler will institute its National TelePanel, a probability WATS-generated national household panel targeting moderate incidence categories.

QuantiFocus, a system introduced in 1988, conducts and analyzes individual in-depth interviews via telephone.

Kapuler also introduced last year Customer Satisfaction Systems, a joint venture operation specializing in customer satisfaction measurements.

It has 40 full-time salaried employees, 34 hourly employees and a staff of 275 part-time coders and interviewers. Its phone center has 140 stations, 90 of which are CRT-equipped.

Stanley Kapuler, 48, is founder-president.

RANK **37**

Lieberman Research West

Los Angeles

Research revenues: **$8.8** million*

Percent change: **27.6%**

Lieberman Research West, a custom ad hoc survey researcher, is organized by industry specialization.

The company focuses on entertainment—pre-testing movie and TV pilots—healthcare, package goods and fast food.

Analysis of financial services and the high-tech/computer industries is being added in 1989. Also new this year are an Asian Omnibus Study, covering five Asian nationalities in California; the Lieberman Los Angeles Poll, a regular survey of consumers and business on both topical and marketing issues; and two focus group facilities.

In 1988, LRW expanded its ISA WATS interviewing facility to 75 CRT-equipped stations. It has 65 full-time salaried employees and 150 part-timers.

Arnold Fishman, 44, is chairman; Michael Liebergall, 42, is president.

* Revenues include those of subsidiary Interviewing Service of America.

RANK **8**

M/A/R/C Inc.

Irving, Texas

Research revenues: **$51.1** million*

Percent change: **1.6%**

M/A/R/C has two primary business divisions.

Custom Marketing Research includes: Entro, a new-product forecasting model; the Advertising Index, which evaluates advertising copy and media plans; M/A/R/C Base, a research data-base system that categorizes and models historical research findings to identify factors in product success or failure; and traditional ad hoc or ongoing survey research programs.

M/A/R/C's Database Marketing division provides a full-service in-house capability in Database Marketing, including consulting, design, creative, mailing, fulfillment, systems management, retrieval and analysis and predictive modeling.

Data collection capabilities include three WATS centers with 235 positions, all CRT-equipped; the Local Market Network with 37 central location sites in 29 cities equipped with PCRS, M/A/R/C's PC data collection software; and a National Panel of 100,000 households used for mail and phone research.

M/A/R/C has client service offices in Irving and nine cities and 448 full-time employees plus a weekly-hourly staff of 1,000.

Cecil "Bud" Phillips, 64, is chairman-ceo; Sharon Munger, 42, is president-chief operating officer.

* Total corporate revenues in fiscal year ending March 31, 1989, were $61.8 million, of which 83% were from research activities. The balance primarily was derived from data-base maintenance services.

RANK **49**

Marketeam/Doane Marketing Research

St. Louis

Research revenues: **$5.0** million

Percent change: **11.6%**

Marketeam/Doane Marketing Research's 11.6% revenue increase from 1987 to 1988 was enough to push it into the Top 50 listing for the first time.

Marketeam Associates, the parent company, conducts custom and shared cost research for consumer product and business-to-business clients. The Doane Marketing Research division specializes in custom and syndicated research for agribusiness. Doane's 25,000-household Countrywide Farm Panel and data base of commercial farm statistics are used to study the agribusiness sector.

During 1988, Doane expanded its multi-client syndicated service offerings in crop chemicals, seed and animal health products.

Doane also increased its attention on monitoring dealer sales and measuring media usage among farmers. In 1989, it will offer a single-source data base tying media usage patterns to product purchase at the farm level.

In 1988, Marketeam started a Service Quality Assessment Service to evaluate customer service programs, and launched Ad*Quick Test which measures impact of print ads and concepts.

A full-time salaried staff of 65 and 175 part-time employees are located in full-service offices in St. Louis and Cleveland. A central telephone interviewing facility has 70 lines.

Carl Block, 52, is founder, president-ceo.

RANK **11**

Market Facts

Chicago

Research revenues: **$37.8** million*

Percent change: **1.0%**

Most of Market Facts' revenues, which were relatively flat from 1987 to 1988, come from custom marketing research studies for marketers of consumer package goods and services, industrial products and governmental agencies and associations.

The company uses a variety of data collection facilities. Telephone interviewing—national and local—is done through three separate central facilities in the Chicago area, which total 144 stations, all CATI-equipped.

Market Facts also maintains a network of eight regionally dispersed shopping mall interviewing centers, where a system of standardized data collection procedures and computer networking for quota control and interim reporting are now being installed.

The third primary data collection facility is its 275,000-household

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Consumer Mail Panel, which also serves as the data base for custom and syndicated research services in the fields of financial services and healthcare.

Marketest Group provides customized store testing, both for new product test marketing and promotional testing for mature food and drug products.

A weekly telephone survey omnibus service, TeleNation, is now in its third year.

The company has 510 full-time salaried employees in 13 separate offices.

Verne Churchill, 56, is ceo; Thomas Payne, 43, is president-chief operating officer.

* These revenues include Market Facts-New York, a wholly owned subsidiary. They do not include Market Facts of Canada, which is 50% owned by Market Facts.

Marketing Research Services RANK 45

Cincinnati
Research revenues: **$6.3** million
Percent change: **-1.0%**

Marketing Research Services is organized into groups that perform a variety of functions ranging from field studies to sophisticated market segmentation analysis.

The Analytical Services Group emphasizes tracking studies and customer satisfaction/quality measurement studies for industries such as banking, chemicals, communications, consumer products, energy, retail, restaurant/fast food and travel. The Health Services Group performs services measurement and patient satisfaction studies. The Retail Group does market share studies for both grocery and department store retailers and feasibility and business environment studies. On-site national in-person interviewing is provided by the Field/Mall Studies Group.

The company's data collection capabilities include a 125-station, CRT-equipped WATS center in Cincinnati, two high-traffic mall facilities and a field staff.

MRS has 80 salaried employees, 48 of whom are exempt, and about 200 part-time workers.

Edward Horgan, 47, is founder and president-ceo.

Market Opinion Research RANK 29

Detroit
Research revenues: **$11.4** million
Percent change: **34%**

This survey researcher was the fastest growing of the top 50 research companies last year. Its 34% jump to $11.4 million edged out No. 40 Total Research Corp.'s 33.9% increase to $7.5 million.

MOR concentrates on consumer and industrial marketing research; media, especially newspapers; audience studies; social and public policy research, and healthcare, public utilities and transportation studies.

It also has become well-known for its political surveys for prominent Republican candidates. In early 1988, Robert Teeter resigned as MOR's president to devote his full attention to the election campaign of George Bush. MOR's political group conducted much of the Bush campaign research, contributing greatly to the revenue increase in 1988.

Also in 1988, MOR opened a subsidiary, MOR/New York, to work more closely with New York-based media clients.

MOR has 71 full-time salaried exempt employees and 16 hourly workers. For telephone interviewing, it operates central facilities in the Detroit area, which total 120 stations, all CATI-equipped.

Frederick Currier, 65, is chairman-ceo.

Maritz Marketing Research RANK 10

St. Louis
Research revenues: **$39.9** million
Percent change: **4.7%**

Maritz Marketing Research is primarily involved in custom marketing research, but it also has syndicated services for the automotive and agricultural industries.

The Maritz Inc. subsidiary last year acquired Arizona Field Research, a data-collection company with facilities in Tucson and Phoenix, and the growth rate has been adjusted to reflect that additional revenue.

Early this year, MMR acquired mall interviewing facilities in Washington, and Columbus, Ohio, and opened a new mall facility in San Bernardino, Calif.

During 1988, Maritz opened a new mall facility in Topeka, Kan., and launched Maritz AmeriPoll, a public opinion poll on topics of interest to media and their audiences.

CustomerCare, a four-step methodology for assessing customer satisfaction data, also was introduced in 1988. Customer satisfaction research programs account for about 20% of Maritz' revenues.

The company employs 392 full-time workers—270 salaried exempt—and about 2,000 part-time interviewers and supervisors located in six full-service division offices; three sales offices; three service offices operated by the Automotive division; and data-collection units that include two branch offices, 44 focus group suites, 26 mall locations, 32 test kitchens and 625 phone lines, which include 228 CATI phone and mall interviewing stations.

William Lewellen, 58, is president.

McCollum/Spielman International RANK 36

Great Neck, N.Y.
Research revenues: **$8.9** million
Percent change: **2.6%**

MSI is organized by divisions. The AC-T division's main service is AC-T/AD*VANTAGE, a multi-region, central location TV copy testing

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methodology.

Its two evaluative models are Potential Attitude Motivation Shift, which evaluates advertising performance in relation to a brand's category position, and Advertising Weight Simulation Model, which studies advertising and media weights' impact on brand share and volume.

AC-T services are available in Europe, Asia, Japan and Puerto Rico through affiliates.

MSI's Prolog division evaluates advertising, providing frame-to-frame real-time reaction to TV commercials and delayed playback of respondents' non-verbal response to advertising. The service is based on mall interviews.

Child Research Services, a wholly owned subsidiary, specializes in one-on-one interviews, focus groups and large-sample studies of children, teens and their parents. Studies include communications research, product/concept tests, concept evaluation and parent-child interaction analysis.

MSI changed its name from McCollum/Spielman Research last year and has 70 full-time employees.

Donald McCollum, 66, is company chairman; Harold Spielman, 62, is ceo.

RANK 28

Mediamark Research

New York

Research revenues: **$13.0** million

Percent change: **16.1%**

MRI, which is 80% owned by MAI Plc., London, operates a syndicated media/product purchase research service that is based on annual, in-home personal interviews with 20,000 adults. The service monitors consumers' exposure to advertising media and, via a leave-behind questionnaire, purchase data on an extensive line of consumer products and services.

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National Analysts

Catherine Paura
National Research

William Stein
Newman-Stein

William Lipner
NFO Research

John Holt
A.C. Nielsen

Data are linked to the Prizm, Acorn, Vision and Clusterplus geodemographic systems and the Vals psychographic system. Clients such as advertising agencies, product and services marketers, magazines, newspapers, broadcasters and cable networks can gain on-line access to the MRI data base.

MRI also produces two special reports based on two-year, 40,000 household data bases that cover business-to-business activity and the affluent market. Reports related to the top 10 local markets, including audience data on newspapers and broadcast stations, also are available.

A microcomputer system called MEMRI enables subscribers to process MRI and other data bases. MRI's Custom Research division specializes in special market studies.

MRI has 52 full-time salaried employees in New York, Chicago and San Francisco offices.

Timothy Joyce, 55, is chairman-ceo; Alain Tessier, 55, is president-chief operating officer.

RANK 38

Millward Brown Inc.

Glen Ellyn, Ill.

Research revenues: **$8.6** million

Percent change: **30.3%**

Millward Brown Inc.'s services include custom ad hoc surveys, consumer and industrial research work and continuous tracking studies marketed under the banner of Advance Tracking Program. ATP uses continuous survey data to evaluate and model the effects of advertising expenditures.

Founded as Ad Factors, MB has been a wholly owned subsidiary of Leamington, England-based Millward Brown PPL since 1986. In March the parent company was acquired by WPP Group, London.

MB has 350 employees—75 of whom are full-time salaried employees. Three client service offices in Glen Ellyn, Monroe, Conn., and Riverside, N.J., include central telephone interviewing operations. Two offices in Rockford, Ill., and Racine, Wis., are dedicated to phone operations. MB has more than 275 WATS dialing stations, of which 165 are CRT-equipped.

In 1989, MB will relocate its Glen Ellyn headquarters to Naperville, Ill.

Robert Meyers, 40, is president-ceo.

RANK 6

MRB Group

New York

Research revenues: **$78.2** million*

Percent change: **28.0%**

MRB Group, a subsidiary of WPP Group, London, consists of Simmons Market Research Bureau and Winona Market Research Bureau in the U.S. Together, the two units account for $36.8 million, or 47% of MRB revenues.

Overseas, MRB consists of BMRB, Mass Observation and MRB International in the U.K.; Basicresearch in West Germany; Hellas MRB in Greece; and JMRB in Japan.

In 1989, SMRB will publish a special Affluent Study on the media and purchasing habits of households with incomes of more than $75,000.

The largest MRB service is the syndicated Simmons study of Media & Markets in the U.S. Now in its 26th year, this study is based on in-depth interviews with 19,000 adults and includes information on media usage, product and brand purchasing, leisure activities, Vals lifestyles and geodemographic segmentation.

Advertisers, agencies and media can gain access to the SMRB data base via printed reports, commercial on-line services, and Choices, which allows non-technical users to retrieve data for new product development, market segmentation, new business solicitation and media analysis.

Custom Studies, the SMRB consultancy, analyzes the SMRB data base as well as perform full-service custom marketing research in consumer and business-to-business markets. About one-third of its revenues come from studies outside the U.S. SMRB's Custom Media Studies division conducts audience studies for specific media vehicles.

Winona Market Research Bureau, with offices in Minneapolis and Phoenix, provides survey research and custom retail store audits. Its central telephone survey facility has 210 CRT-equipped stations. MRB employs a full-time staff of 732 in 12 offices worldwide.

Frank Stanton, 59, is chairman-ceo.

* Activities outside the U.S. accounted for 53.1% of 1988 revenues, or $41.5 million.

RANK 22

National Analysts

Philadelphia

Research revenues: **$15.3** million

Percent change: **5.5%**

National Analysts, a division of Booz, Allen & Hamilton, conducts qualitative and quantitative custom ad hoc surveys for commercial clients and not-for-profit institutions, including federal, state and local governent agencies.

Methodologies include telephone and mail surveys. A recent large-scale in-home interviewing project for the U.S. Department of Agriculture involved the use of lap-top microcomputers to collect data on-site. In 1988, the company introduced NA-lyzer, an interactive PC-based software package that speeds up analysis of survey data.

NA's commercial business is organized by staff specialists: automotive, financial services, information/telecommunications, litigation support, pharmaceuticals and medical equipment, retailing and utilities.

NA has 58 full-time salaried employees and 85 full-time non-exempt employees in its Philadelphia and New York offices.

Marshall Greenberg, 53, is president.

RANK 26

National Research Group

Los Angeles

Research revenues: **$14.2** million*

Percent change: **23.5%**

National Research Group does marketing research for the entertainment industry, especially films. Survey work includes tracking awareness, imagery and interest, audience screenings and copy testing.

Through a London office and affiliates in Tokyo and Sydney, NRG conducts research in 12 countries. The central telephone interviewing in Los Angeles will expand to 120 stations in 1989.

The company has 350 full-time employees.

Co-founder Joseph Farrell, 53, is chairman-ceo; co-founder Catherine Paura, 38, is president-chief operating officer.

* About 15% of NRG's 1988 revenues, or $2.1 million, came from outside the U.S.

RANK 45

Newman-Stein

New York

Research revenues: **$6.3** million

Percent change: **14.6%**

Newman-Stein consists of a main office in New York, a unit in San Francisco and Shelf Power, a New York-based standardized package design testing company co-founded with DGM Inc. in 1986.

The company specializes in consumer research of concept, product, package and advertising testing, tracking studies and all elements of strategic research—attitude, image and market segmentation studies. The company also offers qualitative research services, including focus groups and personal one-on-one interviews.

It has 50 full-time salaried employees.

Newman-Stein is jointly headed by Lawrence Newman, 49, and William Stein, 50.

RANK 9

NFO Research

Greenwich, Conn.

Research revenues: **$40.9** million

Percent change: **5.1%**

NFO Research, a full-service sur-

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vey subsidiary of Pergamon/AGB Research PLC, maintains a mixed mail panel of more than 1 million consumers. Samples of the panel, categorized by demographic and product ownership characteristics, are surveyed via mail or telephone.

The panel is used for concept and product testing, presented to panelists via videotape. Attitude and usage studies, tracking and segmentation studies, several systems for which are available through NFO's proprietary Analycor service, also are conducted.

NFO also markets syndicated services for the beverage, mail order and carpet and rug industries.

Another syndicated service for the Yellow Pages industry, available through the National Yellow Pages Monitor service, will be expanded during 1989. NFO also will introduce a Hispanic Panel in relevant major markets.

Through its NFO/SRG International subsidiary, White Plains, N.Y., NFO provides access to the Pergamon/AGB Research Group in 35 countries.

Telephone facilities located in Toledo, Ohio, and Greensboro, N.C., have more than 150 stations supported by CATI systems.

The company employs 700 in offices in Greenwich, Toledo, Chicago, St. Louis, San Francisco, Minneapolis and Cincinnati.

William Lipner, 41, is president-ceo.

RANK
1

A.C. Nielsen

Northbrook, Ill.
Research revenues: **$880.0 million***
Percent change: **20.5%**

Considering its large revenue base, A.C. Nielsen realized a substantial 20.5% revenue increase in 1988 and maintained its No. 1 status among research companies.

About 57% of revenues are generated from operations in 27 countries, and the monetary conversion rate has had a favorable impact on its growth rate.

A subsidiary of Dun & Bradstreet Corp., Nielsen last year acquired Neville Clark International and its subsidiary Logistics Data System, a worldwide supplier of software for store and shelf management. It also acquired Prodis, a Netherlands-based research company, and U.K.-based Syndicated Data Consultants, which specializes in health & beauty-aid research.

The amount of 1988 revenue contributed by Neville Clark, Prodis and SDC cannot be determined. But the acquisitions hyped its 1988 growth.

Nielsen Marketing Research's flagship Scantrack syndicated service, which provides weekly data on package-goods sales, market share and retail prices from supermarket scanners, added 10 markets in 1988, bringing total penetration to 50 markets. NMR also introduced Scantrack services in Australia, Canada, Japan and New Zealand.

The company also has started to include data from key convenience stores.

It also is integrating data from its new service, NPD/Nielsen Electronic Household Panel, into Scantrack. Members of the 15,000-household panel use hand-held scanners in-home to record all purchases. During 1988, 2,500 households were equipped with meters to record TV viewing.

Nielsen also is now creating a data collection system based on local-market panels; its goal is 27,000 households in 11 markets. Electronic ID cards will record purchase data at scanner-equipped check-outs and record panel household purchases. A comparable system is being introduced in the U.K.

At Nielsen Media Research, 1,800 households were added to its national people-meter TV panel in 1988, bringing the total to 4,200 households nationwide. During 1988, people-meter based measurements were expanded to cover cable TV, syndicated programming and videocassette usage.

Nielsen also measures local market TV viewing in 210 markets via diary and/or meter equipped household panels. Meters were added to two markets in 1988 and five markets will be added this year, bringing the total to 22 metered markets.

John Holt, 48, is chairman/ceo of A.C. Nielsen, and Dun & Bradstreet exec VP and board member. Albert Kretch, 46, is president of Nielsen Marketing Research; James Lyons, 54, is president of Nielsen Media Research.

* About $500 million or 56.8% of Nielsen's 1988 revenues resulted from operations outside of the U.S.

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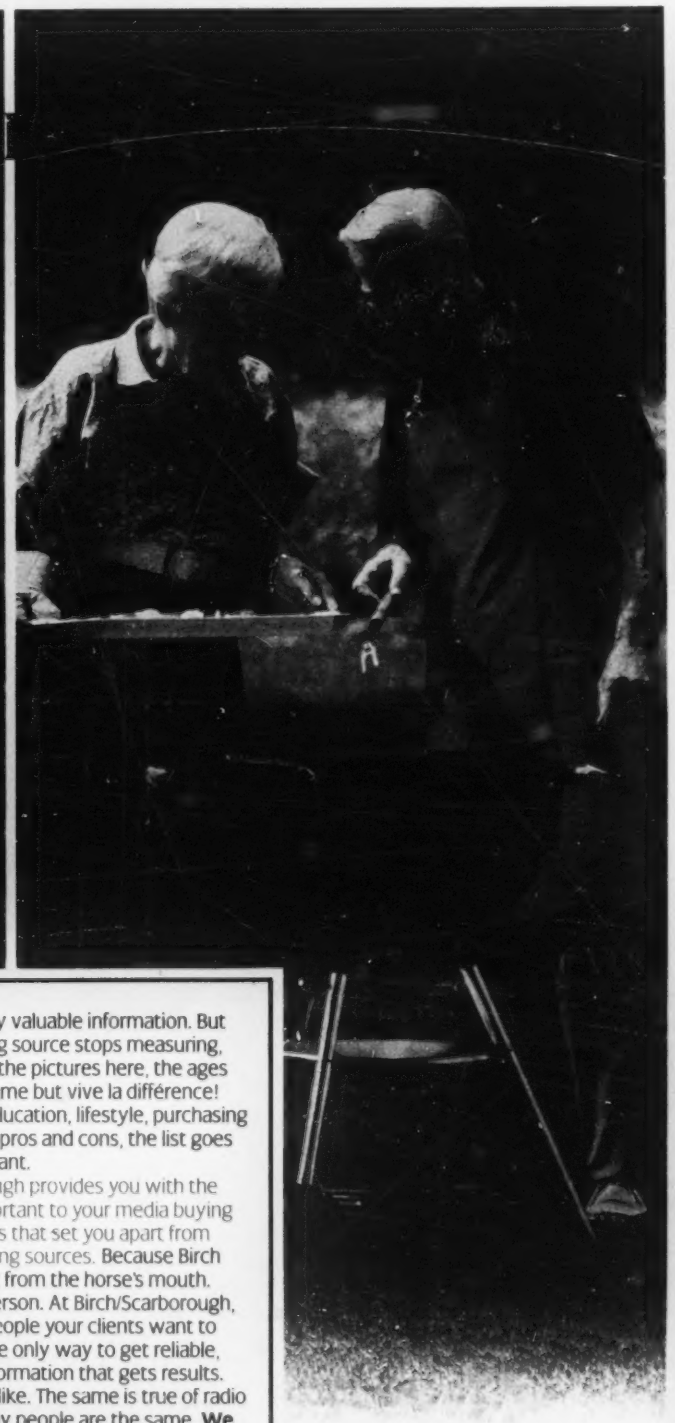

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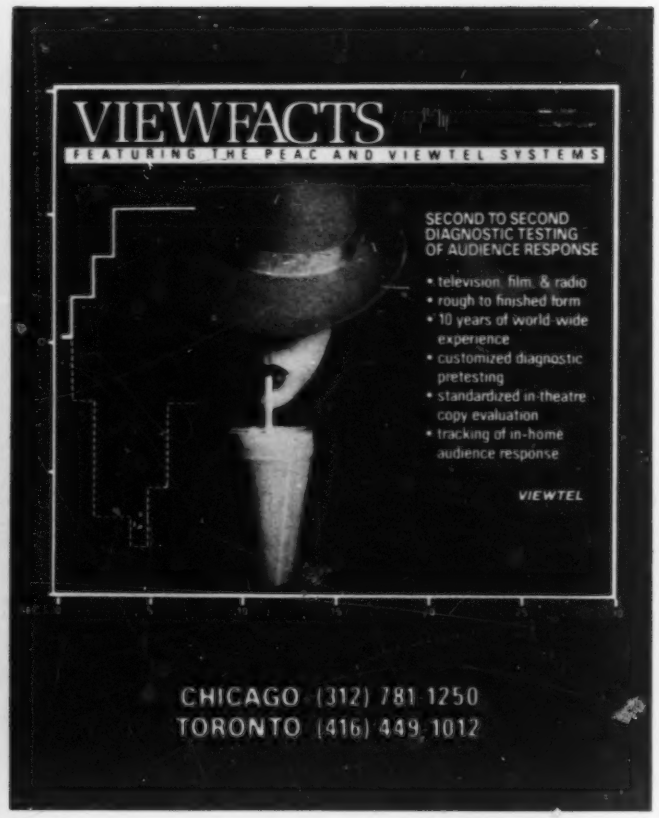
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RANK **13**

NPD Group

Port Washington, N.Y.
Research revenues: **$29.8** million*
Percent change: **16%**

The NPD Group is organized into two business units. Syndicated Services provides tracking data bases that cover product movement through retail channels; consumer purchasing and consumer attitude-awareness studies for industries such as toys, apparel, textiles, sporting goods, jewelry, petroleum/automotive, electronics, healthcare, food service/restaurants, and in-home food consumption.

These syndicated data bases are obtained by combining data-collection methodologies such as mail panel, invoice audits, point-of-sale computerized audits and telephone interviewing.

The Custom Services business unit consists primarily of HTI Custom Research and Marketing Models divisions. HTI operates a 250,000-household mail panel and a related central telephone interviewing facility in College Park, Md. The Marketing Models division provides proprietary mathematical modeling, such as ESP and BrandStar, for pre-test marketing and new product simulation.

NPD has 350 full-time salaried employees located in offices in Port Washington, Chicago, Mission Viejo, Calif., Houston, College Park and—new in 1988—Cincinnati.

Tod Johnson, 44, is NPD's president-ceo.

* Excluded from revenue figures are sales related to NPD's Packaged Goods division, which was spun off in 1987 into a joint venture company, NPD/Nielsen.

About $750,000, or 2.5%, of 1988 revenues came from activities outside of the U.S.

Tod Johnson
NPD Group

Andrew Brown
Opinion Research

Joseph G. Smith
Oxtoby-Smith

Sheldon Silverberg
PDS

RANK **21**

Opinion Research

Princeton, N.J.
Research revenues: **$17.2** million
Percent change: **9.6%**

Opinion Research Corp., a survey research subsidiary of Arthur D. Little Inc., in 1988 introduced a Choice Analysis Market Simulation model to analyze consumer trade-offs and preferences. Last month the company also launched a monthly omnibus survey of the Hispanic population.

ORC provides full-service market research from field and tab and tracking studies through sophisticated multivariate, conjoint and market segmentation studies. Specialties include telecommunications, pharmaceuticals/healthcare, financial services, travel and tourism, environmental issues and employee studies. Shared-cost surveys include the every-other-week General Public Caravan and a quarterly executive Caravan among business executives.

The ORC Market Research division conducts consumer and industrial studies related to awareness, trial and usage, customer satisfaction, market segmentation, consumer needs and wants, product pricing and positioning and advertising effectiveness.

The Corporate Research division specializes in ad hoc and continuous tracking studies of corporate image, issues, communications and strategies.

ORC has 175 full-time employees in Princeton and branch offices in Boston, Washington, Chicago and San Francisco.

The company has a central telephone facility with 100 stations and is CATI-equipped.

Andrew Brown, 44, is president-ceo.

RANK **49**

Oxtoby-Smith

New York
Research revenues: **$5.0** million
Percent change: **-3.0%**

This survey researcher is distinctive in that about 50% of its revenues come from acting as clients' "in-house" consumer research arm, functioning as both research consultant and supplier. O-S provides this service for clients such as Block Drug, Coca-Cola Foods, Equimark, MCI Telecommunications and Videotel.

The balance of the company's revenues comes from custom ad hoc surveys, consulting, and research and testimony relating to legal matters, including trademark infringement and advertising claim substantiation.

During 1988 O-S introduced Pro-Sort, a standardized service for pretesting sales promotions.

O-S's staff of 65 full-time salaried employees is supported by internal field, data processing via a VAX 3499 computer, and a WATS line interviewing center with 20 CRT-equipped stations.

Joseph G. Smith, 62, is founder-president.

RANK **20**

Pharmaceutical Data Services

Phoenix
Research revenues: **$18.3** million*
Percent change: **30.7%**

An operating unit of PCS Inc., PDS saw its revenues rise a substantial 30.7% in 1988, far above the research company average of 13.9%.

The company offers three distinct product lines that collect, analyze and supply marketing information to prescription drug marketers in the U.S.

Alpha Data Services uses data from a network of 10,000 pharmacy computer terminals to develop sales performance evaluations and market potential analyses. Its companion syndicated Alpha Services, conducts audits to develop product brand share and trend data.

Dresden Davis Organization provides Scriptrac. This service provides targeted lists of physicians for direct-marketing promotions, and primary market research on prescribers and users of prescription medication.

Hospital Data Services electronically collects data from 75 hospitals regarding drug use/DRG/costs/procedures and ICD-9.

PDS also provides custom ad hoc research and data base management services.

The company has 167 employees in Phoenix and Philadelphia.

Sheldon Silverberg, 43, is president.

* Revenues do not include those of a subsidiary, Medilog GmbH., Nuremberg, W. Germany.

RANK **34**

J.D. Power & Associates

Agoura Hills, Calif.
Research revenues: **$9.9** million
Percent change: **30.1%**

J.D. Power & Associates is a full-service marketing information/research and consultancy best known for its work in the automotive industry, although it also carries out ad hoc and independently funded subscriber surveys for other consumer and industrial clients.

Power's automotive-related services cover market and media research, consulting, planning and forecasting, distribution analysis and publications, which include the survey results.

The most prominent service is based on annual surveys of customer satisfaction with product quality and dealer service. Other

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J. David Power
J.D. Power

Ian Hunt
Research Int'l

James H. Fouss
Response Analysis

William Wilson
Starch

surveys include automotive consumer profiles. Power sponsors advanced product clinics, product comparison clinics and the Super-Dealer Roundtable. It also does automotive market forecasting in a joint venture with Data Resources, a McGraw-Hill Inc. subsidiary.

In 1988, Power opened offices in Detroit and Coventry, England. There are 190 employees at Power, 46 of whom are salaried/exempt.

Founder J. David Power III, 57, is president.

RANK 5

Research International

London

Research revenues: **$103.4** million*

Percent change: **9.1%**

Research International, with 1,060 full-time employees, considers itself the world's largest ad hoc survey research company. A wholly owned subsidiary of Ogilvy Group since 1987, it has subsidiaries in 14 countries and associates in five others. About 80% of revenues come from outside the U.S.

The company's operating units specialize in attitude and usage studies; multivariate analysis and mapping; print and TV ad testing; new-product development; modeling; market segmentation; and behavioral research. Brand names include Sensor, MicroTest, Solve and Smart.

Decisions Center Inc., the New York unit, has 190 full-time employees and includes Express Data Center—a network of 23 computerized mall locations—and Facts Center—a 94-station, CATI-equipped telephone research facility. Its revenues in 1988 were $15.1 million. DCI/RI specializes in custom survey research: market structure and strategy studies; print and TV copy testing; tracking studies; concept and product testing; and legal studies.

The Cambridge Reports unit has 40 full-time employees and 1988 revenues of $5.6 million. The division specializes in syndicated and ad hoc survey research, focusing on regulated industries such as utilities, financial services and insurance, telecommunications and healthcare. It also performs quarterly, issues-oriented national public opinion surveys.

Ian Hunt, 57, is ceo of Research International.

* Revenues include two U.S. units: Decisions Center Inc., New York, acquired in 1987; Cambridge Reports, Boston, acquired in 1988. Growth rate is calculated on a common base, year to year.

About 80% of 1988 revenues, or $82.7 million, were derived from activities outside of the U.S.

RANK 43

Response Analysis

Princeton, N.J.

Research revenues: **$6.7** million

Percent change: **-16.0%**

Response Analysis, which earned the dubious distinction of suffering the greatest percentage revenue drop among the top research companies from 1987 to 1988, concentrates on commercial survey research.

In 1989, RA plans to expand its activity in strategic research and consulting on business, social and policy issues.

It currently focuses primarily on multi-sponsored and custom studies in financial services, healthcare and telecommunications, litigation support and large-scale U.S. governmental agency survey projects.

The company maintains telephone interviewing facilities in Princeton and in Hamilton Township, N.J., totaling 59 stations. Response Analysis employs 75 full-time and 63 hourly workers.

During 1988, company ownership passed from founders Herbert Abelson and Reuben Cohen to an employee group, and Response Analysis established an outside Advisory Board.

James H. Fouss, 49, is president.

RANK 18

Starch INRA Hooper

Mamaroneck, N.Y.

Research revenues: **$19.0** million*

Percent change: **8.4%**

Starch INRA Hooper jumped to No. 18 in this year's ranking from No. 28 last year. Much of the revenue increase can be attributed to SIH's 1988 acquistion of E. Friedman Marketing Services.

SIH now consists of three operating divisions.

Friedman Data, a collection service headquartered in Detroit, has offices in 27 mall locations throughout the U.S., most of which have focus group facilities and test kitchens. Friedman also has central WATS line interviewing facilities in Michigan and Phoenix. Together with Hooper, this gives SIH an interviewing capability of nearly 100 stations. A CATI system is being installed this year.

Starch Media Research division handles special audience studies and custom media research. It produces the Starch Ad Readership work, Ballot Ad Readership mail surveys and Impression Study Group, which tests print ads and TV commercials.

Roper Market Research division handles both domestic and international ad hoc research work, which includes dealing with the international INRA network of research affiliates. Roper also handles SIH's Limobus, a monthly personal interviewing omnibus service, Roper Reports, *Public Pulse* monthly newsletter, Market Monitor and SIH's panel operations.

Including Friedman, SIH has a full-time staff of 234 employees, 113 of whom are salaried exempt.

William "Jay" Wilson, 52, is president-ceo.

* Revenues include those of E. Friedman Marketing Services. The growth rate is calculated on a common base, year to year.

About 5.3% of 1988 revenues, or $1 million, were derived from activities outside of the U.S.

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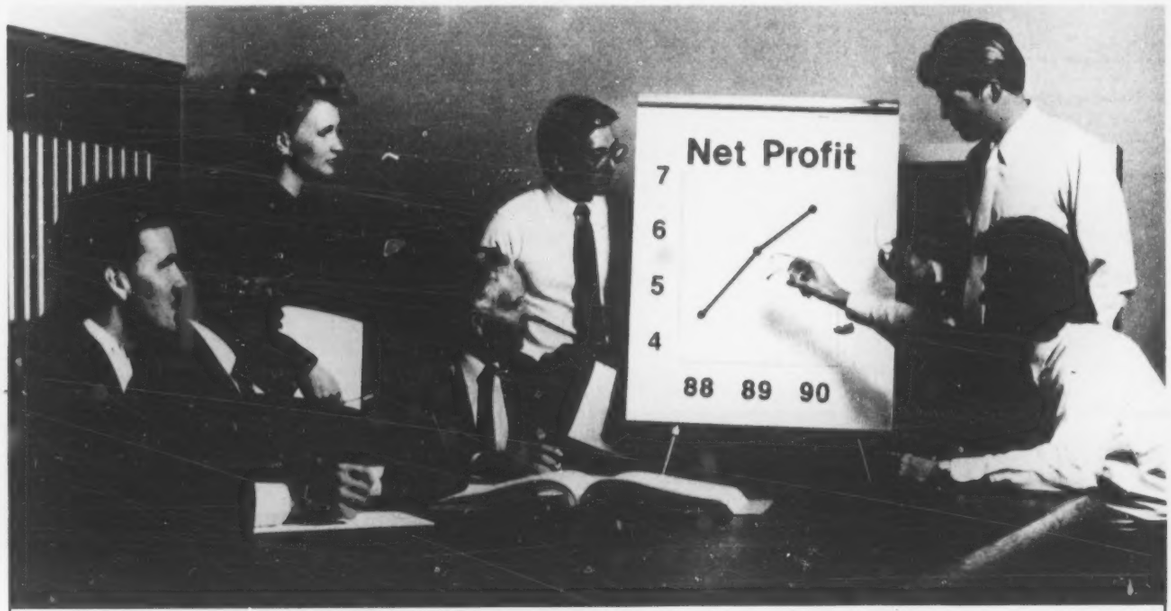

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RANK 40

Total Research

Princeton, N.J.
Research revenues: **$7.5** million
Percent change: **33.9%**

Total Research Corp. realized the second highest revenue jump among the Top 50, logging an impressive 33.9% increase last year.

This custom, ad hoc survey researcher emphasizes proprietary, standardized packages of statistical and analytical techniques.

In 1989, Total Research plans to introduce Rx/Mod to model the role of patient characteristics in prescribing various drugs; Proxim, which will model the elasticity of retail customers to site location; and Equitral, a multi-client service to track brand equity. Last year the company introduced Predictive Segmentation and Pro/Position, which is used to develop product positioning strategies.

Other Total Research packages include its Price Elasticity Measurement System, which evaluates pricing strategies, and Competitive Share Model, which predicts the effect of product line extension or product elimination on market share.

Components Assessment analyzes competitive markets and determines the effect product attributes have on purchase decisions, and Brand-Power is a comprehensive strategic market structure study.

Total Research collects data via telephone and personal interview, focus groups, mail surveys, communication content analysis, store audits and product usage tests. Central telephone interviewing facilities are located in Princeton and Tampa, Fla.

Most of the 76 stations are CATI-equipped.

The company has 98 salaried exempt employees and 300 part-timers.

Founder Lorin Zissman, 58, is president-ceo.

RANK 47

Vanderveer Group

Fort Washington, Pa.
Research revenues: **$6.1** million
Percent change: **5.2%**

About 43% of Vanderveer Group's total revenues are generated from research studies and consulting activities in the pharmaceutical, healthcare, financial, package goods, industrial manufacturing and telecommunications markets. Studies focus on product positioning, new-product development, concept generation and testing, market assessment, trend analysis and consumer behavior and usage.

The company uses quantitative and qualitative research techniques, plus in-depth telephone interviewing. New methodologies are staff-developed and often are rooted in psychological segmentation.

Its data collection facilities include a central telephone interviewing center with 60 WATS stations and two focus group facilities. Data-base management capabilities include a recently developed custom Database Monitoring System for monitoring U.S. physicians.

Vanderveer Group has 50 salaried employees.

Richard Vanderveer, 41, is chairman; Roger Green, 35, is president.

Lorin Zissman
Total Research

Richard Vanderveer
Vanderveer Group

Frank Walker
Walker Research

Joseph Hunt
Westat

Richard Wirthlin
Wirthlin Group

Robert Shulman
Yankelovich

RANK 16

Walker Research

Indianapolis
Research revenues: **$21.7** million*
Percent change: **8.0%**

Walker is organized into three strategic business units. Research & Analysis is a full-service, custom ad hoc survey research operation with client service offices in New York, Cincinnati, Indianapolis and San Francisco.

Datasource offers data collection, tabulation, data-base management and computer services. Its network of data collection offices in Tampa, Fla., Cincinnati, Fort Wayne, Ind., Indianapolis and Phoenix have 240 telephone interviewing stations in total, a majority of which are CATI-equipped. Customer Satisfaction Measurement is a quality improvement consulting organization specializing in designing and administering customer satisfaction measurement programs. Clinical Evaluations, a Walker affiliate, conducts Phase III clinical investigations and trials of drugs, cosmetics, foods, animal products, medical devices and electronic products.

In 1988, Walker conducted its eighth biennial update of its Industry Image study, which measures consumer attitudes toward surveys and polls. Walker employs 131 full-time salaried, 126 full-time hourly and 500 part-time employees.

Chairman-ceo is Frank Walker, 54; President-chief operating officer is James Sammer, 50.

* Total revenues were larger as a result of some non-research activities.

RANK 7

Westat

Rockville, Md.
Research revenues: **$64.3** million*
Percent change: **5.3%**

Westat specializes in large-scale survey research projects, the majority of which are conducted for U.S. government agencies. The company also does custom ad hoc surveys for a variety of commercial and association clients.

The revenue gains realized in both 1987 and 1988 primarily resulted from the National Medical Expenditures Survey sponsored by the Department of Health & Human Services. Westat was hired as prime contractor, along with two subcontractors. The subcontract work, worth $9.8 million in 1988, is included in its revenues.

Westat has a staff of 406 exempt salaried employees—up 9.1% from 1987 levels—with an additional 118 non-exempt employees and a telephone-interviewing, survey-processing and field-interviewing staff of more than 700. Central telephone facilities are located in Gaithersburg and Frederick, Md.

Joseph Hunt, 53, is president-ceo.

* Revenues include those of Crossley Surveys, a Westat subsidiary, but do not include those of computer services unrelated to research projects.

RANK 33

Wirthlin Group

McLean, Va.
Research revenues: **$10.0** million
Percent change: **26.0%**

About 66% of Wirthlin Group's $15.1 million in total revenues were attributed to its Research division.

The division is organized into strategic groups covering communications and public affairs, marketing research and political studies. The company has gained prominence for its White House public opinion survey, funded by the Republican National Committee during the Reagan administration, and its campaign work for state Republicans. This activity helps explain the 26% surge in 1988 election year revenues. The company also focuses on developing strategic communications programs. It performs survey work for Hill & Knowlton.

During 1988, Wirthlin Group started a program of public seminars and custom in-house seminars for marketing research professionals.

The company has 80 full-time employees, 44 of whom are salary exempt. Client service offices are located in New York, Princeton, N.J., Chicago, Santa Ana, Calif., and Los Angeles. A Provo, Utah-based telephone interviewing facility has 142 stations, 60 of which are CATI-equipped.

Richard Wirthlin, 58, is founder-chairman; James Granger, 45, is chief operating officer.

RANK 14

Yankelovich Clancy Shulman

Westport, Conn.
Research revenues: **$24.5** million*
Percent change: **-6.2%**

In 1988, Yankelovich Clancy Shulman acquired London-based Albemarle Market Research, a full-service survey company, and renamed it Albemarle/Yankelovich Clancy Shulman. It also acquired American Marketing Services, Newport Beach, Calif., a survey company that was renamed Yankelovich Clancy Shulman/West.

YCS's 1988 figures do not include these acquisitions.

YCS is organized into two units. The Research Unit includes consumer marketing research, business-to-business research, public opinion/policy studies, corporate communications studies and multi-sponsored surveys. Proprietary techniques include Target Optimizer, Position Optimizer, Strategic Cube, Product/Feature Optimizer and research models.

The Consulting Unit specializes in product positioning and relaunch; market structure analysis; new-product and service development; concept screening and prioritization; acquisition studies and new-business analysis; and marketing plan development. Syndicated surveys include Monitor, Youth Monitor and Hispanic Monitor.

YCS has 135 employees and branch offices in Chestnut Hills, Mass., and Newport Beach, Calif.

Robert Shulman, 37, is president-ceo.

* About $2 million or 8.2% of YCS revenues were attributed to activities outside the U.S.

Contributor Jack J. Honomichl coordinated this Research Business Review.

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